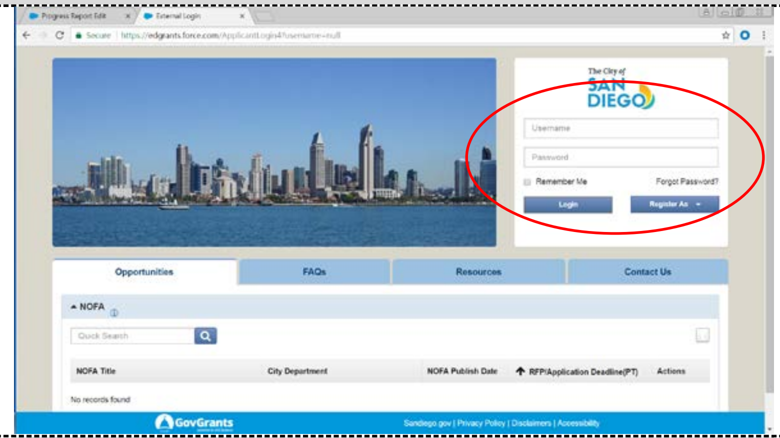
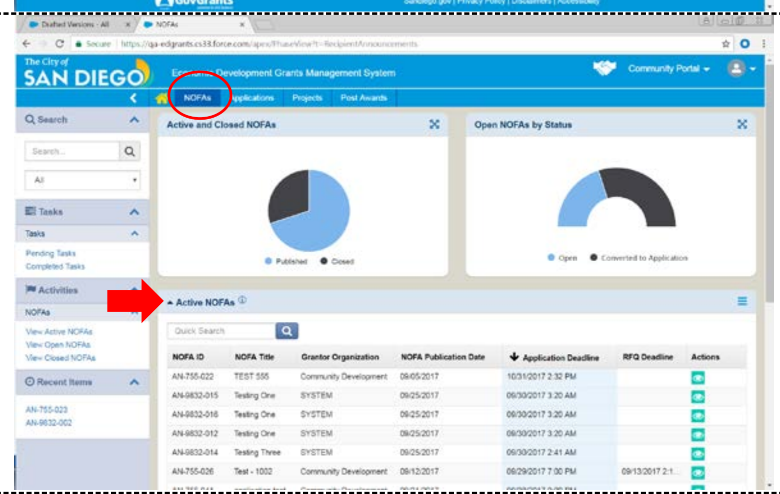
The City of SAN DIEGO

RFQ Response Submission

You will learn:

- **How to complete and submit a Request for Qualifications (RFQ) response in ED Grants**
- **How to open and continue working on a previously saved RFQ response in ED Grants**
- **How to enter your organization's Board of Directors members in ED Grants after registration**

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary R–epresentative or Secondary Representative of your organization. ***NOTE:*** *Your organization may need to be registered in ED Grants first to receive log-in credentials. Refer to the 'ED Grants User Registration' guide for assistance.*	
2	Go to the '**NOFAs**' tab and then scroll down to the '**Active NOFAs**' section to view the Notices of Funding Availability (NOFAs) currently accepting Request for Qualifications (RFQ) responses. ***NOTE:*** *If there are no NOFAs displayed, then that means the City is not accepting responses at the time of your visit.*	

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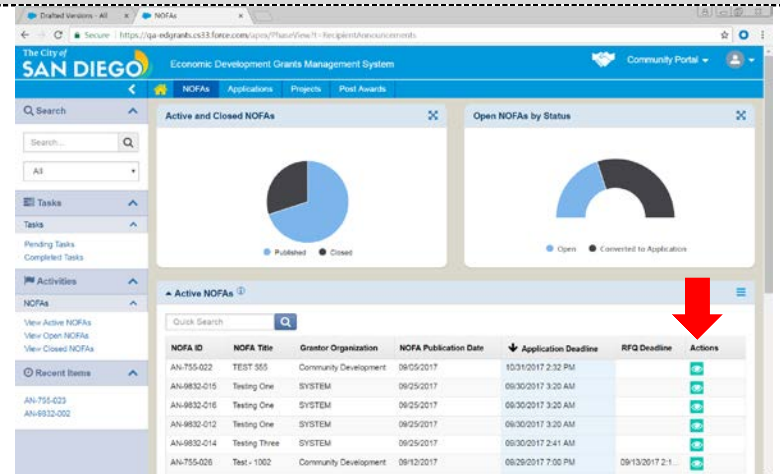
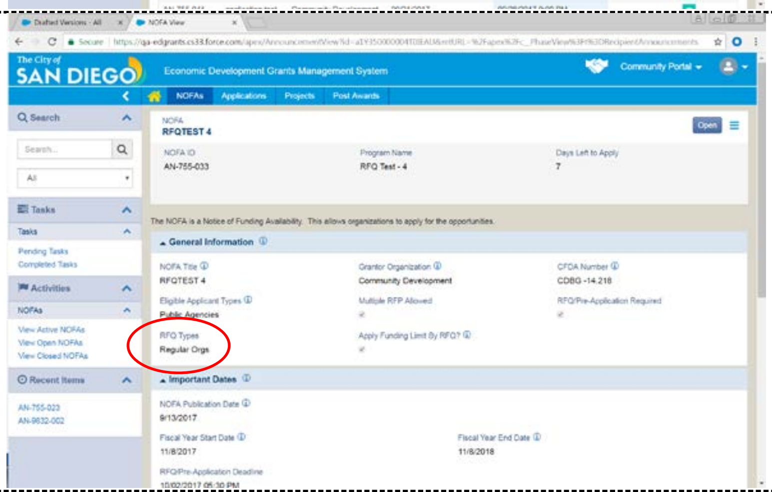
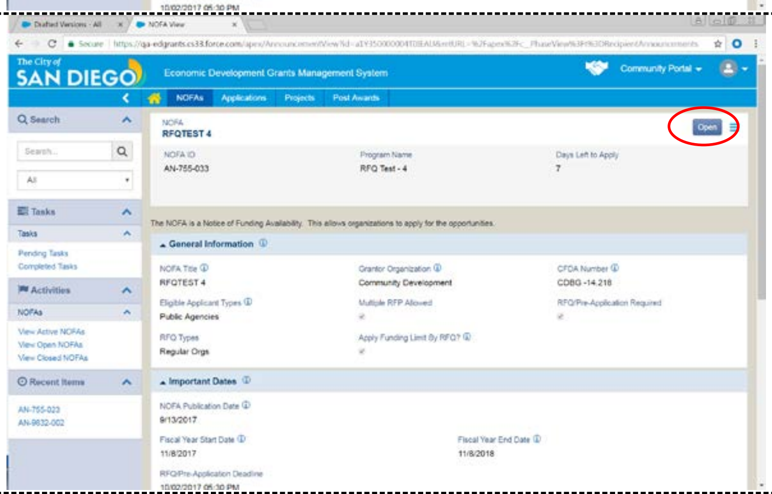
Step	Description	Screenshot
3	Find the NOFA you would like to submit an RFQ response for. Click on the eyeball icon ( ) in the '**Actions**' column to view it.	
4	Verify this is the NOFA you would like to submit an RFQ response for by reviewing the '**General Information**' section and locating the '**RFQ Types**' field. If you had selected the wrong one, go back to step 2 to begin anew.	
5	Find and click on the '**Open**' button to add the NOFA to your organization's '**View Open NOFAs**' list.	

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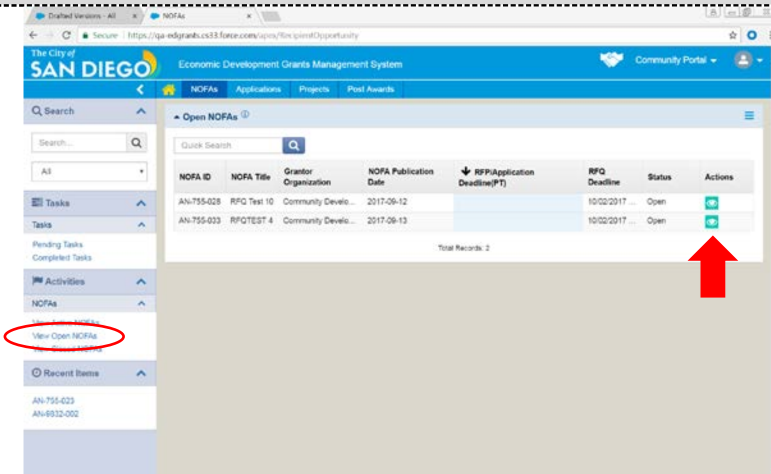
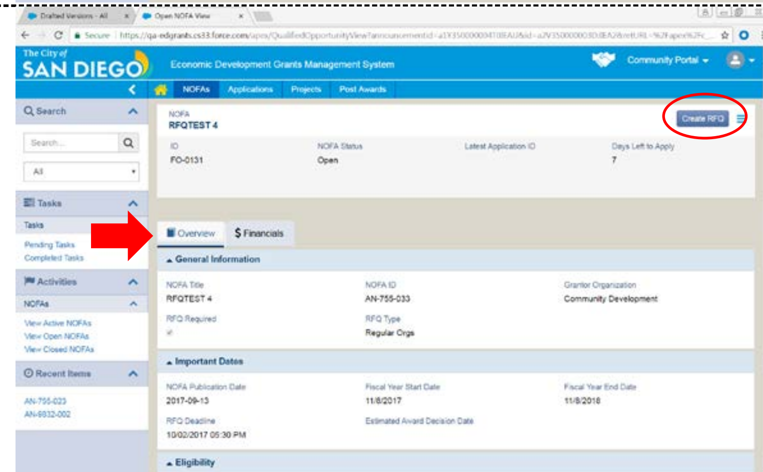
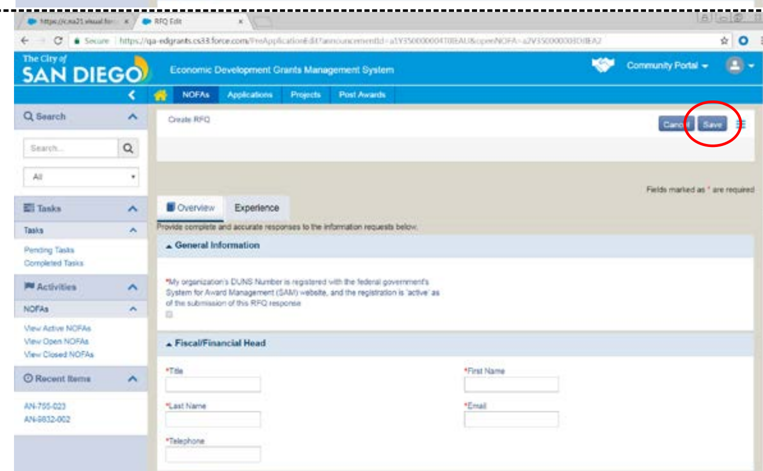
Step	Description	Screenshot
6	Click on the '**View Open NOFAs**' link along the left side. Find the specific NOFA you would like to submit an RFQ response for. Click on the eyeball icon ( ) in the '**Actions**' column to open it.	
7	You should now see the NOFA open and two tabs: '**Overview**' and '**Financial**.' After verifying once again that this is the NOFA you would like to submit a response for, find and click on the '**Create RFQ**' button.	
8	The '**Overview**' tab should now be open with five sections (i.e., '**General Information**,' '**Fiscal/Financial Head**,' '**RFQ Contact**,' '**Mission Statement**,' and '**Organization Profile**') with editable fields. Begin populating the fields, using the help text icons (ⓘ) for guidance and clarification. After you are finished, click on the '**Save**' button. ***NOTE:** You will only see the fields you can edit. Other fields from your '**Organization Profile**' (such as organization name, address, board of directors, etc.) will be imported automatically.*	

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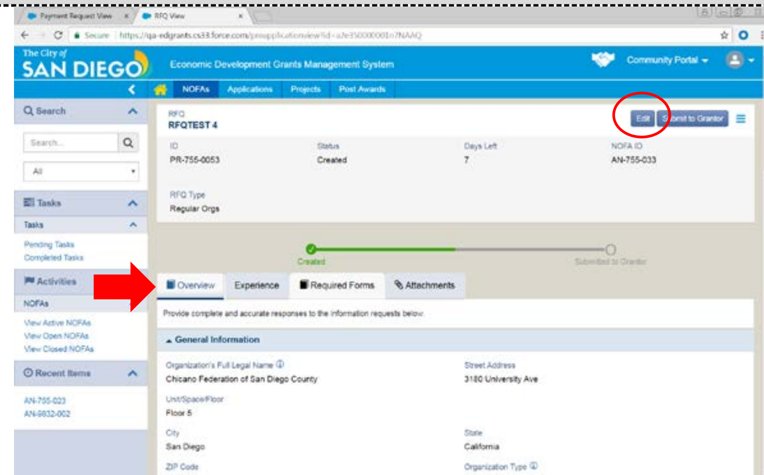
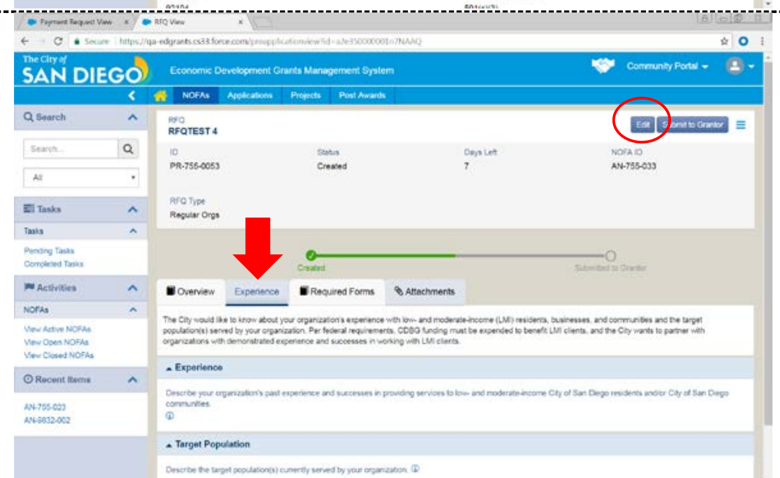
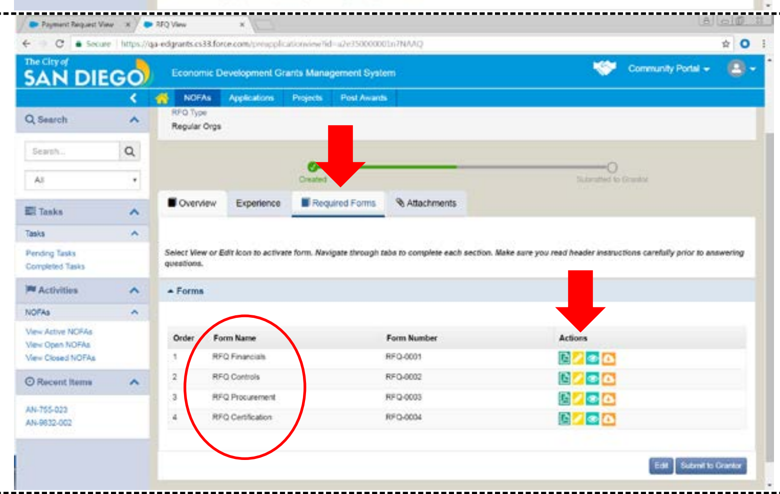
Step	Description	Screenshot
9	After clicking on the '**Save**' button, you should now have access to the '**Experience**,' '**Required Forms**,' and '**Attachments**' tabs. Review the **'Overview**' tab and verify your entries. If needed, click the '**Edit**' button to reopen the fields to make changes and then click on the '**Save**' button. Also, make sure the information on your organization's Board of Directors was imported from the '**Organization Profile**' (make updates in the '**Organization Profile**' if needed).	
10	Click on the '**Experience**' tab. You will need to populate the '**Experience**' section and '**Target Population**' section. Click on the '**Edit**' button first to open those fields. Enter your responses in the narrative fields, using the help text icons provided (ⓘ) for guidance and clarification. You are limited to 4,000 characters per section, including spaces. After you are finished, click on the '**Save**' button.	
11	Click on the '**Required Forms**' tab. You will find four forms to complete: '**Financials**,' '**Controls**,' '**Procurement**,' and '**Certification**.' To open and populate each form one at a time, click on the pencil icon (✎) in the '**Actions**' column corresponding to each form.	

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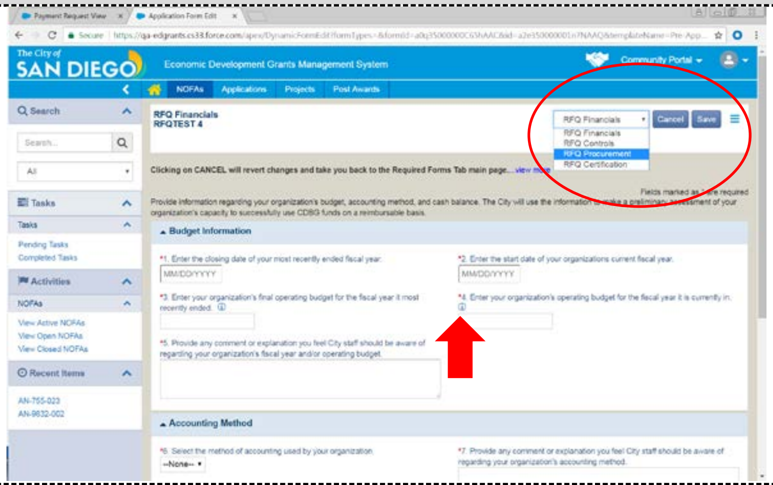
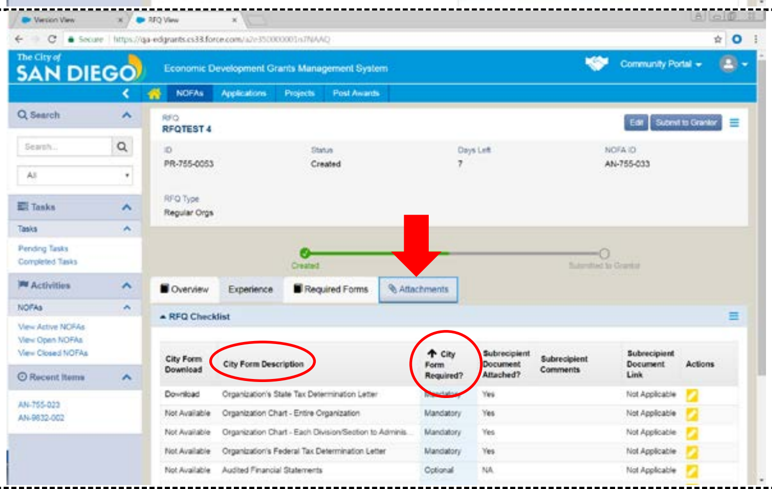
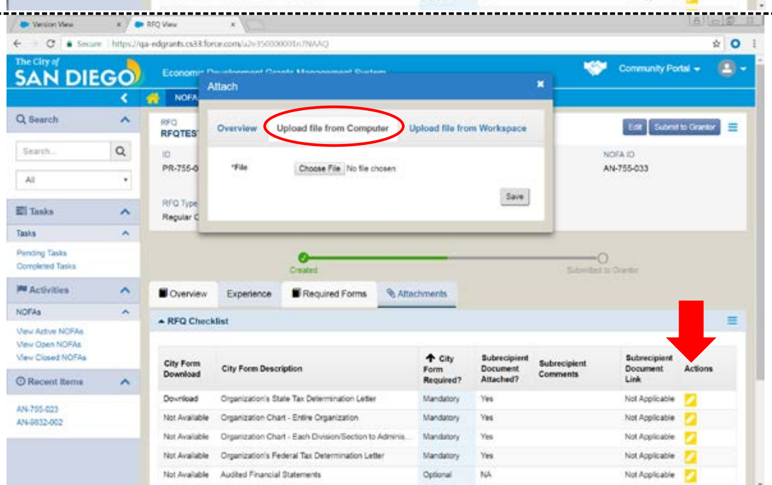
Step	Description	Screenshot
12	Fill out each required field, using the help text icons provided (ⓘ) for guidance and clarification. You may navigate from form to form using the dropdown menu next to the ‘**Cancel**’ button towards the top. Make sure to click on the ‘**Save**’ button before navigating away from a form. After saving each form, you will need to click on the ‘**Edit**’ button to reopen the fields for changes, if necessary.	
13	Click on the ‘**Attachments**’ tab. You will see a list of documents in the ‘**City Form Description**’ column which you may need to provide by uploading a PDF of each document to the corresponding item on the list. Check the ‘**City Form Required?**’ column or the RFQ Handbook to see if a particular document is either required or optional (i.e., as applicable).	
14	To upload a document for a particular form on the list, click on the pencil icon ( ) in the ‘**Actions**’ column corresponding to the form. A popup window with the ‘**Upload File from Computer**’ tab and ‘**Upload File from Workspace**’ tab should appear. Click on the ‘**Upload File from Computer**’ tab.	

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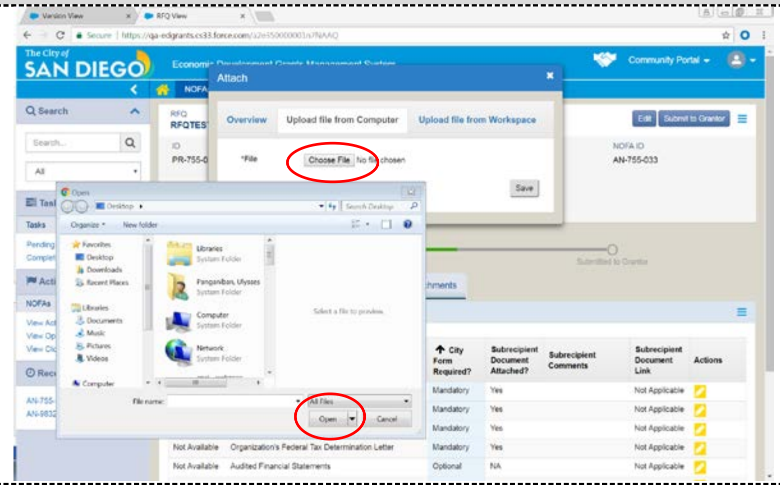
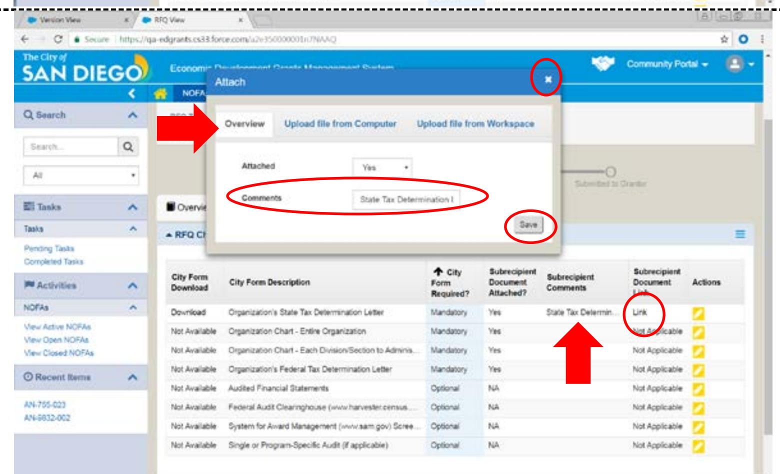
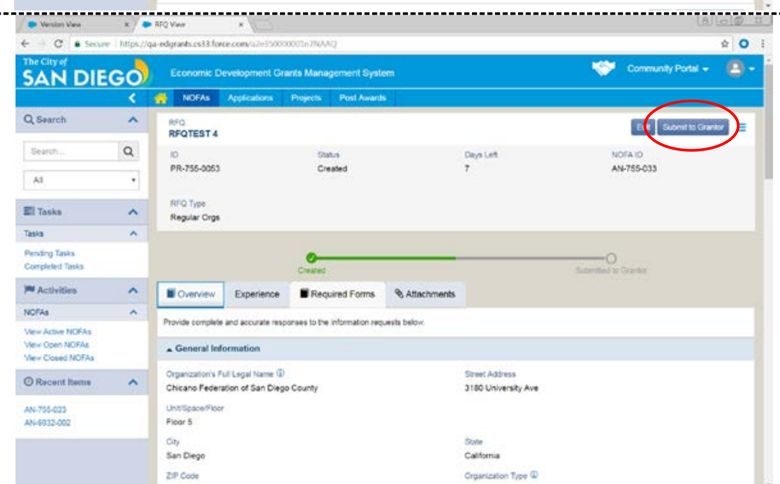
Step	Description	Screenshot
15	Click on the ‘**Choose File**’ button to navigate to the file you would like to upload from your local computer. Click on the ‘**Open**’ button to upload the file to the system. ***NOTE:*** *The system will only accept the following file types: PDF, JPEG, and PNG.*	
16	Click on the ‘**Overview**’ tab. Enter a required short description of the file in the ‘**Comments**’ field. Click on the ‘**Save**’ button and then click on the ‘**X**’ button to close the popup window. You should now see your comment in the ‘**Subrecipient Comments**’ tab and the word ‘**Link**’ in the ‘**Subrecipient Document Link**’ column. ***NOTE:*** *Clicking on the word ‘**Link**’ brings up the documents uploaded. Refer to the FAQs on RFQ attachments to get guidance on the correct documents to upload.*	
17	Click on the ‘**Submit to Grantor**’ button to officially submit the RFQ response to the City for review. ***NOTE:*** *Only your organization’s Primary Representative will have access to the ‘**Submit to Grantor**’ button. If you are working as the Secondary Representative, coordinate with the Primary Representative to officially submit the RFQ response to the City.*	

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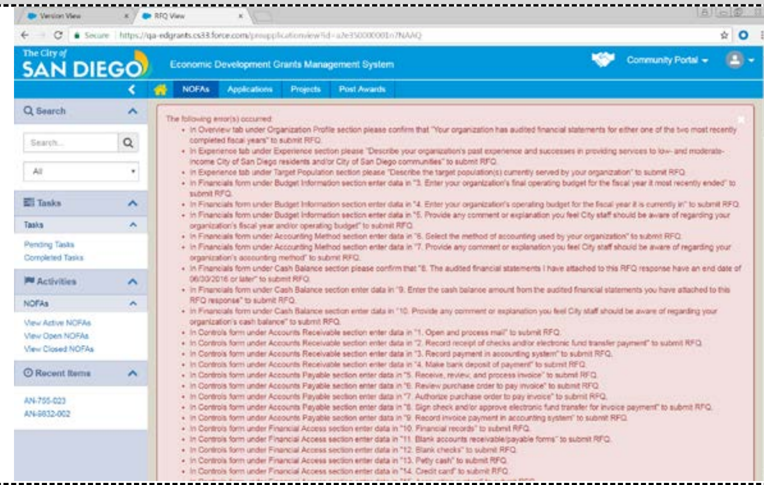
Step	Description	Screenshot
18	The system will validate the information you had entered using internal controls. If there are any errors or deficiencies identified, the system will display error messages along the top of the screen. All error messages must be addressed and cleared before the system will allow you to submit the RFQ response.	
19	Once successfully submitted, the RFQ response will be reviewed by City staff, and a determination (either "qualified" or "not qualified") will be made. Only "qualified" organizations will be invited to participate in the subsequent RFP process.	**End**

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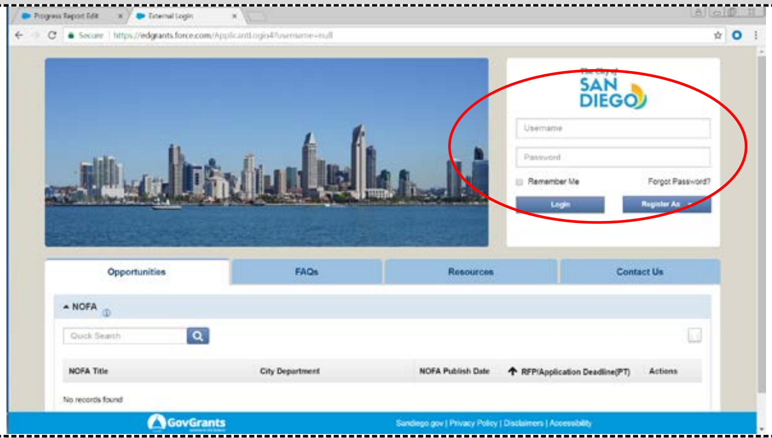
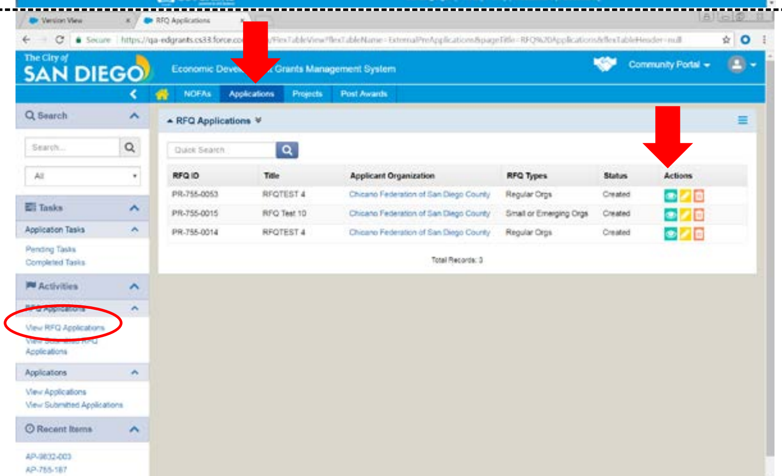
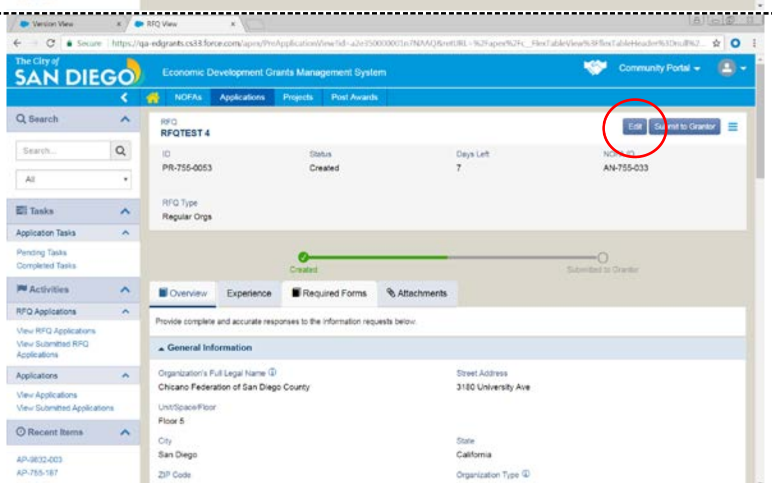
How to Open and Continue Working on a Previously Saved RFQ Response:

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary Representative or Secondary Representative of your organization. ***NOTE****: While both the Primary Representative and Secondary Representative are able to work on the RFQ response, only the Primary Representative will be able to officially submit it to the City.*	
2	Go to the '**Applications**' tab and then click on '**View RFQ Applications**' along the left side. Look for the previously saved RFQ response you would like to revise. Click on the corresponding eyeball icon ( ) in the '**Actions**' column to open the RFQ response.	
3	Click on the '**Edit**' button to continue working on the RFQ response. Refer to the steps outlined in the '**RFQ Response Submission**' guide.	

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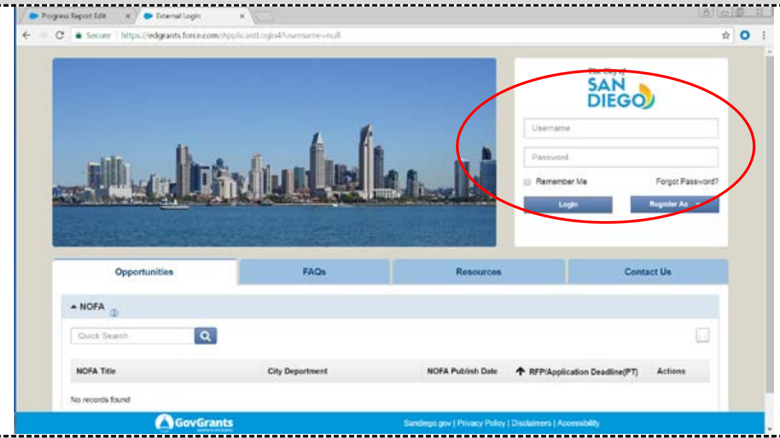
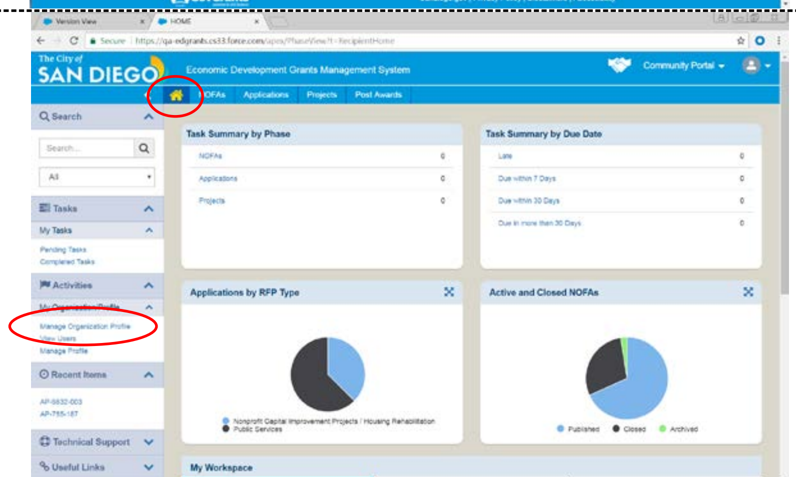
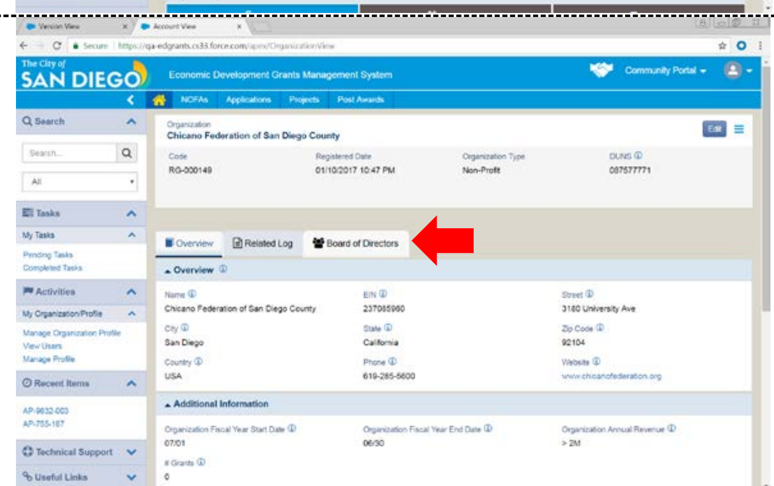
How to Enter Your Organization's Board of Directors Members in ED Grants:

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary Representative or Secondary Representative of your organization.	
2	Click on the '**Home**' tab (🏠) and then click on '**Manage Organization Profile**' along the left side.	
3	You should now see three tabs: '**Overview**,' '**Related Log**,' and '**Board of Directors**.' Click on the '**Board of Directors**' tab.	

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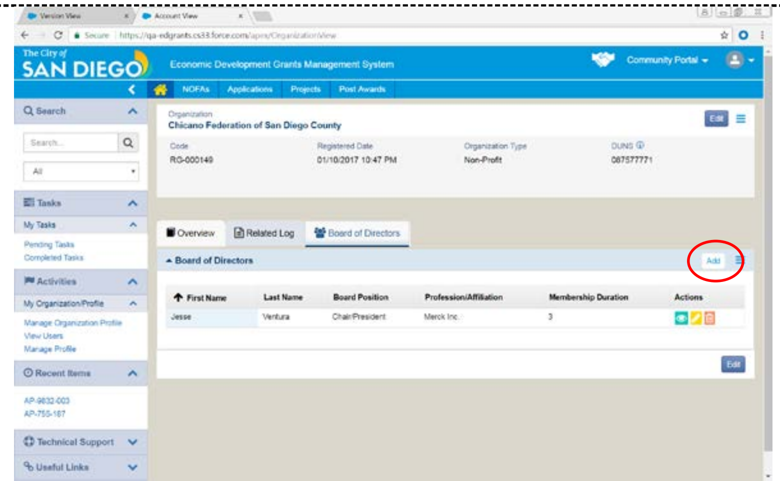
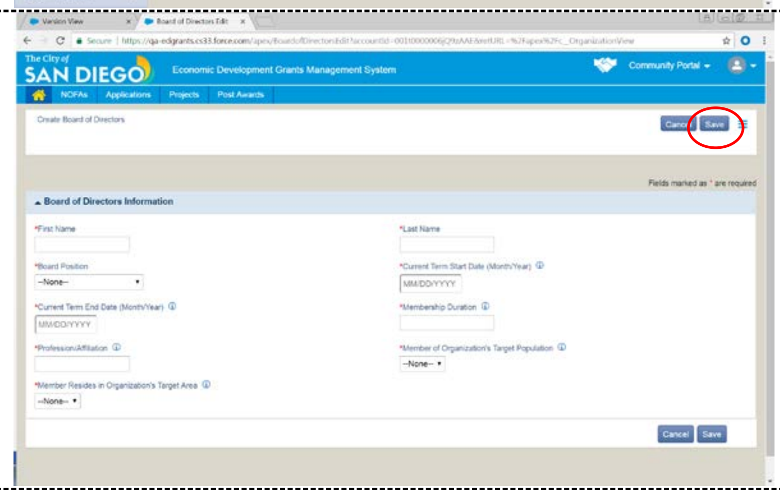
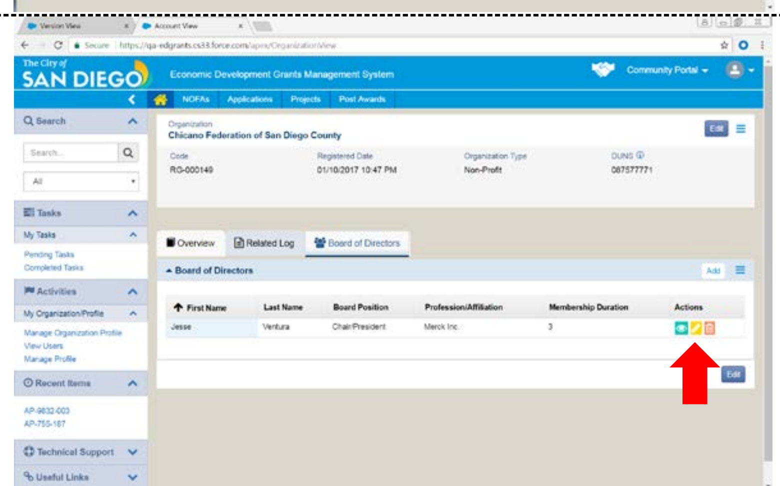
4	Click on the ‘**Add**’ button to open a page where the profile of one board member may be entered.	
5	Fill out the fields on the page, using the help text icons provided (ⓘ) for guidance and clarification. When you are finished, click on the ‘**Save**’ button. Repeat steps 3–5 for each board member until all members have been entered.	
6	To edit a board member profile previously entered, click on the ‘**Board of Directors**’ tab and one of the icons in the ‘**Actions**’ column. The trash can icon ( ) deletes the entire existing profile from the system. The pencil icon ( ) opens the profile for editing, after which the ‘**Save**’ button should be clicked to preserve the changes. The eyeball icon ( ) opens the profile for viewing only.	
7	You may update the ‘Board of Directors’ tab at any time by following the above steps.	**End**

For additional support, email CDBG@sandiego.gov or visit the ‘Resources’ tab at edgrants.force.com.